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Analysis of MMI Ukraine Media Research for 12 Cities in the Ukraine

Dnipropetrovsk, Donetsk, Kharkiv, Kirovograd, Kyiv, Lugansk, Lviv, Mykolayiv, Odessa, Rivne, Simferopol and Zhytomyr

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Background & Purpose:

Internews Ukraine contracted the Kyiv based MMI Ukraine (Marketing and Media Index) research firm to do a baseline survey of media usage in 12 cities of the Ukraine during May 2001. Cities chosen for inclusion were geographically distributed throughout the country, had diverse economic bases, and had a minimum population of at least 175,000 (Rivne) up to a maximum population of nearly 2,000,000 (Kyiv). The 12 city survey is viewed as a representative sample of the entire country. The purpose of the survey was to determine population interest in local broadcast media and to establish baseline information regarding use of computers and the internet.

Survey Methodology:

MMI conducted its research via face to face interviews, using standard statistical research methods to interview respondents, (i.e. Kish grids -divide the designated universe into sectors, establish a system for a true random sample (start from city center, take two left streets, then a right, find a woman in the household aged 45 to 65 to interview). Respondents were offered a series of defined choices for each question, rather than being asked to volunteer an answer. This process is used to eliminate recall/memory problems with the respondents. In short, MMI's methodology has passed scrutiny and is regarded as quite professional work. However, it should be noted that MMI has admitted its refusal rate for its television audience research ("Peoplemeter" version) can be as high as 60%. The refusal rate for this survey was 13%. Factors that may influence the refusal rate are privacy issues or time commitments for active participation. For comparison, the refusal rate for participation in telephone audience research surveys in the USA is generally around 40%. The stated refusal rate of 13% should be regarded as exceptionally good, which permits a fairly accurate portrayal of media usage in these 12 cities.

In each city, the random sample universe consisted of 550 respondents aged 16 to 65, in representative proportion to the accepted age/sex demographic breakout of the city. Face to face interviews were conducted to eliminate omission of those who do not have telephones and for ease in gathering data. The universe sample size meets standard statistical criteria for a margin of error of approximately + or - 4%. In the USA, a statistically valid, random sample universe size of 400 respondents is routinely used for a margin of error of + or - 5%.

Further demographic data concerning education level, marital status, employment status, and a question related to percent of family income used to purchase food were also included to verify broad based demographic and economic status distribution in the respondent sample. This data was requested at the end of the survey. This practice is customary, as it has been proven that respondents are more prone to provide correct personal income related answers following, rather than prior to providing the answers to a survey questionnaire. To assess basic economic status of all respondents, totals for the question asking what percent of the household's income was spent on food are as follows:

Less than a quarter (up to 25%)	2.6%
From a quarter to a half (25% to 50%)	17.1%
From a half to three quarters (50% to 75%)	27.3%
More than three quarters (from 75% to 100%)	42.5%
Difficult to answer	10.5%

This question is important, as people with little disposable income use free over the air media (usually television) as their main source of entertainment since they can't afford much else. Economic status of all respondents can also be inferred by the level of unemployment. Employed respondents averaged 60.6% of those surveyed, unemployed averaged 39.4%. Clearly, levels of unemployment do not reflect officially recorded statistics of 5.3% (source: "The Economist" Country Briefing for Ukraine – July 2001), but can likely be viewed as more accurate than official statistics. Distribution of age and sex of respondents follow basic demographic curves (slightly more women than men, with the largest age category being
35-44 - with minor variations in three cities).

While individual city statistics vary slightly, this chart indicates the averaged national breakout of the demographics included in the survey:

Survey Demographics

(Figures rounded to one place)

Sex	
Men	47.3%
Women	52.7%
Age	
16 – 19	9.4%
20 – 24	11.0%
25 – 34	21.1%
35 – 44	22.6%
45 – 54	19.5%
55 – 65	16.4%
Employment Situation	
Working	60.6%
Not Working	39.4%

Questions Answered by the Research

Computers and Internet Use

Questions 1 through 4 concerned use of computers and the internet, including e-mail. In virtually every city, at least 20% of the population had used a computer within the last 30 days. (In contrast, in the USA, computer usage was 45% of the population only five years ago – and is currently approaching 70%). Respondents were not asked where they used a computer, as the assumption is most respondents do not personally own a computer but use them in work or public access situations.

Computer usage within the last 30 days ranged from a low of 20.6% (Zhytomyr) to a high of 38.4% in Kiev. This is understandable, as the capitol would necessarily have more resources/access to computer technology than Zhytomyr, a largely rural farming community. However, in a second question related to use of the internet (including e-mail), in the universe of those people who use computers, Odessa (54.5%), Dnipropetrovsk (50.9%), and Lviv (42.4%) all outdistanced Kiev (41.7%) in internet usage. The assumption is that while many organizations within the capitol (i.e.. governmental bodies or businesses) may use computers on a more routine basis, access to the internet is not as firmly developed. This same trend generally holds true for both e-mail and internet usage, although with a lesser percentage for e-mail only usage. However, since savvy e-mail users would understand that most e-mail itself functions via the internet, the data from these distinct tables may be somewhat misleading. It is assumed that intra-net e-mail communications systems are rare, as these are generally used by large technologically sophisticated organizations.

It is interesting to note that while Kyiv is the capitol city, clearly interest in communications technology is high in the relatively prosperous Dnipropetrovsk. As a percent of computer users, Internet usage in that city exceeds Kyiv by 9%, while overall computer usage is 9% less. Further, while internet usage in Lviv is approximately the same as Kyiv, access to news sites is significantly higher. Only about half of Kyiv internet accessors go to a news site, while 75% of all internet users in Lviv do. This trend would indicate that Lviv computer/internet users do not believe they have reliable local or national news information from traditional media sources and depend on the internet news sites to provide information. A similar high proportion of news site access also exists in Donetsk (69.1%), and Rivne (64.5%). In fact, in seven of the surveyed cities, internet users exceed Kyivians in accessing news sites. Surprisingly, in both Odessa and Kharkiv news site use is lower than Kyiv, indicating those citizens believe they have enough sources of news available through conventional means and do not need to access news sites.

Computer Use

As expected, the largest group of computer users in each city were aged 16 – 24, with one exception (Odessa). If the age category is expanded to include all computer users age 16 – 34, in all cities, this expanded category represents an average of 61% of all computer users. While this might indicate that computer based media projects should be geared only towards these younger demographics, those aged 35-44 are also a significant population of users, and might be in positions of authority. They might be using computers for business purposes only and could be educated for expanded internet use, possibly through benefits derived by distance education, and networking.

City	Total Computer Users	Age 16- 24	Age 25 – 34		***Combined 16 – 34***		Age 35-44	Age 44-65	Age 55- 65
Kyiv	38.4%	37.4%	26.6%		***64.0%***		21.2%	12.0%	2.8%
Simferopol	32.9%	33.7%	24.5%		***58.2%***		27.1%	9.9%	4.9%
Rivne	30.2%	35.1%	31.5%		***66.6%***		19.8%	8.0%	5.7%
Dnipropetrovsk	29.4%	39.6%	25.2%		***64.8%***		18.1%	13.9%	3.2%
Mykolayiv	29.2%	29.0%	24.9%		***53.9%***		24.0%	17.1%	5.0%
Kharkiv	29.0%	37.4%	24.6%		***62.0%***		22.6%	12.9%	2.5%
Donetsk	27.1%	41.9%	23.8%		***65.7%***		8.5%	11.7%	4.0%
Lugansk	24.6%	35.9%	24.9%		***60.8%***		21.0%	14.4%	3.7%
Odessa	24.3%	26.5%	29.6%		***56.1%***		22.4%	15.2%	6.2%
Lviv	24.2%	29.6%	27.3%		***56.9%***		24.1%	14.2%	4.8%
Kirovograd	24.0%	42.5%	22.8%		***65.3%***		17.2%	13.0%	4.6%
Zhytomyr	20.6%	37.8%	30.0%		***67.8%***		19.7%	11.5%	.9%
Computer User Averages	27.8%	35.5%	26.3%		***61.8%***		20.5%	12.8%	4.0%
Estimated National Avg.	**27.8%**	**9.9%**	**7.3%**		***17.2%***		**5.7%**	**3.6%**	**1.1%**

Internet use

By using the data tables for both computer usage and internet usage, we can assume the following percentages of the total population of each city routinely access the internet. That figure is followed by the percentage of the total population who also routinely access news sites. It is assumed the younger demographics for computer users is maintained with internet access. Further, as most internet sites are in English, younger demographics are more likely to be able to navigate the web in English.

In addition to researching the number of existing internet cafés, additional research on how many ISP's exist, their ownership, reliability, and availability outside the capitol would be useful.

The following chart illustrates internet and news site users expressed as a percent of the city's total population. Expressed as a national average, the research shows that approximately 11% of the entire population of the Ukraine uses the internet, and approximately 6% of those users visit news sites.

Internet & News Site users in each city (figures rounded to one place)

City	Internet users as a % of the total City population	News site visitors as a % of the total City population
Kyiv	16.0%	8.9% (55% of internet users)
Simferopol	13.5%	8.3% (61%)
Rivne	11.2%	7.2% (64%)
Dnipropetrovsk	14.9%	9.6% (64%)
Mykolayiv	11.0%	6.3% (57%)
Kharkiv	9.6%	3.3% (34%)
Donetsk	11.1%	7.7% (69%)
Lugansk	6.2%	2.3% (37%)
Odessa	13.2%	6.4% (48%)
Lviv	10.3%	7.7% (75%)
Kirovograd	6.2%	3.5% (56%)
Zhytomyr	4.9%	1.8% (37%)
Estimated National Average	**10.7%**	**6.1%**

Based on the high young demographics of computer users and the perception of high internet Café penetration in even small cities (anecdotal observation –Gaydosik May 2001 regional consulting), further investigation of these public options to internet use may be warranted. At an average cost of 1 Hr per hour of use, young people seem to have no problems enjoying use of these cafés. Observation also concluded that most usage by this age group was for internet game playing. Internet education seminars in conjunction with these small cafés could be useful training forums in the regions. Targeting older demographics in the community with practical applications could also expand public usage, but language issues will be a barrier for older demographics. However, sites available in other than English are added daily. Potential uses include both education and trade information. For example, in some agrarian communities in underdeveloped countries, farmers are using these public internet access points to research commodities pricing, adjusting their wholesale patterns for best income pricing.

Preferred Media for Information

Question 5 asked for the respondent's main source of information. As in nearly every other developed country in the world, television placed first by a wide margin. Participants were asked to rank four sources of information in order of importance to them (television, radio, print, and internet). From a low of 68.4% in Kyiv to a high of 86% in Donetsk, television far surpassed all other choices.

Interestingly, those people who said television was their most important source did not rely much on the additional choices of media for more information. The assumption is that television viewers believe they are getting enough information from this single source. In contrast, both primary radio listeners and primary print users heavily supplemented their information with other choices (radio or print) for additional information. The user's dependence on the second source is nearly a mirror image for both primary radio and print users. In Odessa, the reliance of both primary radio and primary print users on the alternative source was nearly evenly matched to the primary source. The percentages vary in the remaining eleven cities, but a clear indication is that radio and print users should be regarded as a very similar audience since they tend to use both media for their information. Programming, articles, or even advertising messages designed to target or impact this audience should use the other media to capitalize on and reinforce the message.

Of those respondents who considered the internet as their primary source of information, most other media choices were relatively equal in importance to them. And, while they prefer the internet, they use other media as well. Two exceptions to this trend were in Kharkiv and Kyiv. Internet users in these cities regard other media choices as rather distant second options for information.

Major (Primary) Source of Information

(figures rounded to one place)

City	Television	Radio	Press	Internet
Kyiv	68.4%	14.3%	14.0%	2.1%
Simferopol	71.7%	12.8%	12.4%	2.2%
Rivne	79.3%	12.7%	7.5%	1.0%
Dnipropetrovsk	79.5%	8.5%	8.4%	3.4%
Mykolayiv	74.1%	16.9%	10.7%	2.1%
Kharkiv	80.9%	11.1%	6.4%	.9%
Donetsk	86.0%	10.0%	3.1%	1.3%
Lugansk	81.6%	10.4%	6.6%	1.1%
Odessa	72.4%	11.4%	11.3%	2.2%
Lviv	74.8%	16.4%	9.0%	2.0%
Kirovograd	79.0%	15.4%	5.3%	.2%
Zhytomyr	76.8%	13.3%	7.3%	.7%
Estimated National Average	**77.0%**	**12.7%**	**8.5%**	**1.6%**

Television Program Content Preferences

Question 6 asked for preference in general television program content. Respondents were given a choice of ten topics and asked to choose no more than four. The topics were (in this order): News, Soap Operas, Films, Sports, Humor, Talk Shows, Documentaries, Game Shows, Culture/Music, and Other. Responses were sorted on a cumulative basis for all nine content choices. Responses for Other were statistically insignificant, so this category was eliminated from the final data.

In all but three cities (Mykolayiv, Lviv, and Zhytomir) the <u>top content selection was News.</u> In the three noted cities, Films were the first choice, followed by News as the second choice.

With little variation in the order of preference, the top 3 program content choices for all cities consists of News, Films, and Humor programs. More surprising, and perhaps an indication of a maturing television market, Soap Operas were the absolute last or next to last choice for all cities except Zhytomyr - where Soap Operas were ranked as the 5th most popular option.

News demographics were highest for both men and women aged 45-65. At the other extreme, most young men and women aged 16- 24 found almost any other viewing option more interesting than News with the general exception of Soaps (men) and Sports (women) – a viewer anathema respectively. Surprisingly, in many cities, men aged 16-24 liked documentaries, sometimes ranking them on a par with Humor programs. Without specific program information, its not possible to refine this statistic. For example, young men may have been attracted to programs about nature and wildlife, not social issues programming, or vice versa. However, it is clear that documentaries are not the best way to reach young women. With some minor variations by city, the primary viewing preferences of young women 16 –24 are Soap Operas and Cultural/Music programming.

Documentaries and talk shows, an established means of communicating larger principles in democracy development, were also ranked in the bottom half of the list of viewer choices. Those who do prefer documentaries were consistently the more mature demographics of men 45- 65, and women 25-44. These demographics might be considered decision makers, but content should be geared towards their demographic. Consideration might also be given to placing more stress on news content development in lieu of documentary or talk show production development to reach broader demographics. However, respondents might also be reacting to low quality productions, or commercial and political messages shrouded in the trappings of a documentary or talk show. Recent field observations (Gaydosik – May 2001 regional consulting) noted that most "documentaries" produced by local stations were in fact program length commercials for various enterprises or government agencies. There is little evidence to suggest that national channels operate any differently. Future research (possibly MMI's "Peoplemeter" data) could determine which specific documentary or talk show programs broadcast nationally actually enjoy high viewership. Conversely, message delivery to younger demographics aged 16-25 might include social service (PSA) announcements adjacent to their primary television viewing choices as an alternative to longer form documentary programming, or use of radio instead.

Choice of News Origination

Question 7 asked respondents which television channel they preferred to watch (for news) and were asked to list them in order of preference. Viewers were given four choices which included all available options within each category – National Channels (UT, Inter, 1 + 1, STB), Russian (ORT, RTR, NTV, TV-6), Local (all that were pertinent for each city), and Other. If a respondent volunteered they did not watch any news programming, the interviewer skipped all remaining television news questions and went directly to radio questions.

By a fairly large margin, the majority of news viewers in nearly every city selected National Channels as their first viewing choice for news. The one exception was Odessa – where Russian Channels were the first choice. However, it is significant that in four key cities – Kharkiv, Dnipropetrovsk, Simferopol, and Donetsk, a minimum of 10% of the population chooses Local Channels as their first preference for news & information. Perhaps more significantly, over 18% choose this source in the more economically prosperous cities of Donetsk (18.1%) and Dnipropetrovsk (18.4%).

For seven cities, the second most popular choice of viewers for news & information were Local Channels (Rivno, Dnipropetrovsk, Mykolayiv, Kharkiv, Donetsk, Kirovgorad, and Simferopol), besting both National and Russian Channels. Russian channels were the second choice in Zhytomyr, Lviv, and Kyiv, followed by Local Channels as a third choice. Odessa respondents selected National Channels for their second choice, and Local for their third choice. Lugansk residents preferred National Channels as both their first and second choice.

Establishment of Local Channels as a first or second choice for news information in the surveyed cities is quite significant. As Local Channels generally do not enjoy the higher end programming that National Networks are able to broadcast, viewers must make a conscientious decision to switch channels to watch Local News & Information programming. Most programmers world-wide will acknowledge that News programming does not stand alone, but is dependent on the rest of the broadcast schedule to develop a loyal audience. The effort needed to persuade audiences to switch channels is often regarded as a Herculean task. For this reason, promotion departments have risen in stature and have become integral to media business development strategies.

Further, while cumulative averages using these twelve cities may not accurately reflect the total national sentiment, the averages can be viewed as an indicator of national viewing habits. Using this cumulative data, Local Channels are clearly the top second choice for viewers on a national basis, besting both National and Russian Channels. If viewer trends are comparable to audiences around the world, this finding is consistent. Television news viewers want an overview of their world, but also want good local news to complete their information requirements.

Choices of News Provider*

(figures rounded to one place)

* People who volunteered they did not watch any television news programming or who did not indicate a choice for each of these three options are not included in this chart. Hence, cumulative figures do not add up to 100%

City		1st			2nd			3rd	
	Nat.	Rus.	Local	Nat.	Rus.	Local	Nat.	Rus.	Local
Kyiv	71.4%	18.2%	4.0%	18.2%	40.0%	17.1%	4.6%	16.3%	26.5%
Simferopol	46.3%	29.5%	10.1%	21.7%	21.5%	32.4%	8.7%	11.6%	28.0%
Rivne	84.5%	9.1%	4.4%	11.2%	29.7%	48.5%	2.3%	11.5%	34.9%
Dnipropetrovsk	62.9%	16.0%	18.4%	20.8%	28.1%	44.2%	12.1%	33.3%	29.0%
Mykolayiv	63.9%	21.1%	6.2%	14.2%	13.3%	38.9%	5.9%	8.0%	20.2%
Kharkiv	63.8%	16.6%	13.8%	22.7%	21.6%	41.5%	7.1%	17.3%	25.1%
Donetsk	51.3%	30.7%	18.1%	33.1%	18.5%	39.0%	11.2%	9.7%	30.5%
Lugansk	49.7%	43.9%	3.8%	32.9%	18.7%	27.7%	6.0%	4.1%	36.0%
Odessa	38.9%	46.6%	4.5%	32.3%	28.4%	15.5%	12.7%	6.4%	32.6%
Lviv	58.7%	18.2%	2.4%	17.0%	30.3%	14.6%	5.6%	4.7%	21.8%
Kirovograd	86.7%	5.8%	3.7%	8.9%	4.7%	50.2%	.4%	1.3%	6.4%
Zhytomyr	73.8%	6.9%	1.1%	6.9%	21.2%	17.5%	.4%	4.5%	11.0%
Estimated National Avg.	**62.7%**	**21.9%**	**7.5%**	**20.0%**	**23.0%**	**32.3%**	**6.4%**	**10.7%**	**25.2%**

Level of Trust

Question 8 asked respondents to estimate their level of trust in the four categories of viewing options (National, Russian, Local, Other Channels). Respondents were asked to indicate their level of trust in each option on a scale from 1 to 5, with 5 being the highest with "complete trust." While this type of question is often included in developing media market surveys, in established markets the assumption is that viewers simply watch what they consider to be true and useful information. Hence, the question of "trust" puts a different spin on how the respondent should answer and may or may not accurately reflect reality. Ultimately, "Trust" levels should proportionately equate to a viewer's top choices for news information.

In developing media markets, questions regarding trust more often elicit a response to political dissatisfaction with the perceived purveyor of the news information (i.e. government or political parties). Another possibility is that viewers believe they have no other options for news and must watch a source simply to get general information. However, they may not believe what they are being told. For example, in Zhytomyr, the first choice for news programs are the National Channels by a very large margin. Russian Channels rank far below as a first choice, and are nearly equal to Local Channels for a second choice. However, the top maximum level of trust for National Channels ranks below Russian Channels (13.3% vs. 17.3% respectively) in Zhytomyr.

For all choices of primary source of news, the majority of respondents used a ranking of 4 (not complete trust, but fairly high) –meaning that most respondents do not completely trust their chosen source. This seems reasonable, as most people do not want to be viewed as blind followers of anything anyone tells them. Most surprisingly, at this level (4) the National, Russian, and Local Channels enjoy nearly the same level of trust (30.0%, 35.7%, 30.4% respectively) in Zhytomyr. Similar anomalies exist in other cities, such as Donetsk where National Channels are the first choice of the majority of respondents, but levels of trust in this news source are equaled or bettered by those enjoyed by Local Channels. In Kirovograd, the clear second most popular choice for a primary news source is Russian Channels. However, the trust in Russian channels is abysmal (2.5% and 4.4% respectively). In Simferopol, the most popular choice for news are the National Channels, but Local Channels enjoy a much higher level of trust from their viewers. This would certainly indicate an opportunity for Local Channels in Simferopol to improve their market share.

Breaking out the statistics for the First Choice of news programming only, levels of trust for "complete"(5) and "high" (4) are displayed below. Lower levels of trust are not displayed.

City	1st Choice	Trust Level	Trust Level	1st Choice	Trust Level	Trust Level	1st Choice	Trust Level	Trust Level
	Nat.	"5"	"4"	**Rus.**	"5"	"4"	**Local**	"5"	"4"
Kyiv	71.4%	17.7%	36.7%	18.2%	11.4%	34.6%	4.0%	4.9%	21.7%
Simferopol	46.3%	8.2%	17.2%	29.5%	12.7%	26.1%	10.1%	11.1%	27.0%
Rivne	84.5%	16.1%	51.6%	9.1%	8.3%	28.6%	4.4%	8.8%	41.6%
Dnipropetrovsk	62.9%	22.2%	37.4%	16.0%	15.4%	27.6%	18.4%	16.7%	35.3%
Mykolayiv	63.9%	21.7%	25.5%	21.1%	11.9%	15.0%	6.2%	9.8%	18.2%
Kharkiv	63.8%	25.8%	28.4%	16.6%	20.5%	19.3%	13.8%	14.9%	32.4%
Donetsk	51.3%	31.1%	31.5%	30.7%	32.0%	28.3%	18.1%	29.5%	37.0%
Lugansk	49.7%	17.4%	27.7%	43.9%	23.7%	22.9%	3.8%	10.9%	21.4%
Odessa	38.9%	15.9%	25.2%	46.6%	19.0%	27.5%	4.5%	10.1%	16.3%
Lviv	58.7%	15.8%	29.4%	18.2%	11.7%	21.1%	2.4%	7.4%	10.3%
Kirovograd	86.7%	25.4%	41.3%	5.8%	2.5%	4.4%	3.7%	11.8%	23.1%
Zhytomyr	73.8%	13.3%	30.0%	6.9%	17.3%	35.7%	1.1%	6.1%	30.4%
Estimated National Avg.	**62.7%**	**19.2%**	**31.8%**	**21.9%**	**15.5%**	**24.3%**	**7.5%**	**11.8%**	**26.2%**

Again, while not scientifically correct, an average of the trust levels in television news for Ukraine as a whole can be inferred from this analysis. It appears that National Channels enjoy a higher level of average trust at both levels "5" and "4" than Russian and Local Channels, but not by much. Further, this trust is definitely not proportional to the level of National Channel viewership.

Specific Local Studio/Channel News Viewership

Questions 9 through 14 were answered only by those respondents who watch news programming of Local TV Studios/Channels. As this limits the universe of respondents, accuracy of the information provided here is correspondingly limited by the sample size. However, this kind of data most closely corresponds to internationally accepted forms of audience research. In each city, a card was provided to respondents that listed all Local Channels. Respondents were simply asked to indicate which Local Channel(s) they watch, and presumably in order of preference. Age & sex demographics for individual Local Channels can be extrapolated from the MMI database.

In seven of the surveyed cities, the viewing options were four or less - with at least one of those options being clearly identified as some form of the original Regional TV Centers developed under the communications systems of the former Soviet Union. In five cities (Kyiv (9), Kharkiv (7), Lugansk (6), and Mykolayiv (5)) a minimum of five local options were presented. The number of options is somewhat reasonable for Kyiv and Kharkiv with populations exceeding 1,000,000. However, in Mykolayiv and Lugansk, the population figures indicate that perhaps these markets are overbuilt. Too many local viewing options dilutes the ability of the community to support each broadcast facility financially (via advertising). In turn, this forces these facilities to be open to any source of financial support – which usually includes veiled political support.

Each of the city surveys should be viewed in their own context, with additional Internews research and anecdotal information to supplement the analysis. However, it is possible to draw some conclusions from the overall MMI data about the state of Local Channel news programming.

In eight cities, one Local Channel strongly dominates as the first choice of viewing (expressed as a percentage of at least 10% more viewership than its closest competitor). The three cities where the race for first choice is much closer are Zhytomyr (a difference of 4.6%), Mykolayiv ((6.6%) and Lugansk (3.4%). Its interesting to note that both Mykolayiv and Lugansk might be considered overbuilt – as described in the above paragraph.

What is not identified in the survey is which dominant Local Channels operate in conjunction with a National Channel partner for additional programming. As explained earlier, such affiliation is a distinct advantage in developing audience loyalty through better entertainment programming.

In two cities, the dominant Local Channel is clearly identified with the Regional TV Center. (Kirovograd – "Channel 5 Regional TV;" Zhytomyr – "Zhytomyr Regional TV")

In one city, the dominant Local Channel is clearly identified as local city government media. (Kyiv – "Kyiv.")

In eight cities, the dominant Local Channel is generally recognized and also identifies itself as a privately owned and operated station. (Lviv – "Mist TV;" Odesa – "Art Channel 7;" Kharkiv – "7 Channel;" Donetsk – "TV & RC Ukraina;" Simferopol – "Chernomorskaya TV & R Company;" Dnipropetrovsk – "Channel 11;" Rivne – "Rivne 1;" Mykolayiv – "Telecom 1"). Of course, some form of support from the local city government may be associated with these media – usually in the form of space for facilities or utilities.

In one case, the dominant choice is actually a cable channel (Lugansk –"LCT - Lugansk Cable TV") - presumably privately owned.

It is most significant that the clear majority of popular Local Channels are those which are identified as <u>private television.</u> As municipal and regional governments are faced with hard budgetary choices, the luxury of maintaining a separate media complex simply to promote local government activity is becoming cost prohibitive. This has resulted in lower quality programming and loss of audience – which has been to the benefit of private stations.

Further, the common use of shared frequencies throughout Ukraine may also be confusing to the average viewer as to what Local Channel they are watching. For example: in Kharkiv, local studio "ATVK –Channel 11" actually broadcasts its news programming on the frequency of "7 Channel" at specific times during the day. If viewers do not pay particular attention to the studio's identification during their news programming, viewers may be confused as to what channel they are actually watching. The audience for "ATVK –Channel 11" may actually be higher (or lower) due to respondent confusion. Similar confusion may result with viewer preference for a National Channel that is being relayed via a locally assigned frequency that it shares with a Local Channel. Viewers may be watching a locally originated program, but may not clearly recognize this fact.

Time of Day to Watch Local News

Question 10 concerned the preferred time to watch Local Channels. Four choices were available: mornings, afternoons, before 20:00 and after 20:00. Respondents were instructed to choose no more than two. Viewers preferred to watch Local Channels after 20:00 with three exceptions: Dnipropetrovsk, Kirovograd, and Lugansk. These viewers preferred Local News prior to 20:00 Viewer preference for a Local News time is ordinarily tied to their ability to watch a National news program in a non-competing time period. Hence, its logical that Local Channels should never program their newscast against those of National Channels. Time period choice is also related to demographics. As the most dedicated news viewers are in the 25 – 65 age category, the assumption is that they also have jobs or families to attend to, and may be busy with other duties until after 20:00. Nevertheless, the majority of respondents say they will watch Local News from approximately 18:00 on. Programming Local News after 20:00 may also be disastrous as National Channels may be broadcasting entertainment fare, forcing the audience to choose local news over entertainment – not an even battle. Mornings were preferred as a distant third choice in all cities. However, in a highly competitive market, a weaker Local Channel might consider providing a morning newscast as an alternative in order to develop audience. For example, "Novy Donbas" in Donetsk produces two newscasts – one in the early morning and another in early afternoon. Due to lack of frequency access, they do not have broadcast time available in the evening. The newsroom puts relatively the same amount of energy and resources into producing both newscasts (Gaydosik May 2001 regional consulting). From the research data, we can see that the Donetsk audience preference is essentially halved in the afternoon. It makes far more sense for Novy Donbas to put most of their resources into producing a better early morning newscast, as the potential audience is twice as large. Additionally, we see that the morning news preference in both Rivne and Odessa is relatively high. This may be due to early morning employment requirements of local industry (farm workers and shipping). It certainly presents an audience growth opportunity for Local Channels.

Preferred Time to Watch Local News

(figures rounded to one place – respondents also permitted to state more than one choice)

City	Morning	Afternoon	Before 20:00	After 20:00
Kyiv	18.1%	17.0%	40.0%	70.2%
Simferopol	17.8%	3.7%	42.2%	77.2%
Rivne	25.8%	5.6%	43.0%	80.8%
Dnipropetrovsk	16.5%	7.0%	67.4	51.4%
Mykolayiv	13.3%	5.0%	45.9%	60.5%
Kharkiv	22.1%	7.3%	52.6%	68.0%
Donetsk	20.1%	9.5%	46.1%	70.2%
Lugansk	16.1%	11.5%	55.0%	49.1%
Odessa	23.4%	15.0%	38.8%	68.5%
Lviv	16.1%	2.6%	37.0%	76.5%
Kirovograd	3.6%	31.5%	75.8%	51.0%
Zhytomyr	19.8%	3.9%	49.8%	66.2%
Estimated National Average	**17.7%**	**10.0%**	**49.5%**	**65.8%**

Preferred Individual Local News Programs

Question 11 asked respondents to select their preferred top five Local News programs from a printed card that listed all choices. What follows is a correlation of the majority of the respondents first choice of Program to their first choice of Local Channel. Note that program choice directly corresponds to channel choice. In other words, whoever has the top local news program is also usually the top local channel. This wisdom has long been understood by US broadcasters. Interestingly, in three cities, the top channel choice and program choice do not maintain their top position when profiled in the cumulative data of all program mentions. This suggests there may be broad, but not committed viewership of other local news programming.

	1st Local Channel Choice	1st Local Program Choice Mention	Same Channel?	Program in same position for All Mentions?
Kyiv	Kyiv	STN	yes	yes
Simferopol	Chernomorskaya TV & R	Volna	yes	yes
Rivne	Rivne 1 (Novi Kanal)	Novyny	yes	no
Dnipropetrovsk	Channel 11	News of Channel 11	yes	no
Mykolayiv	Telecom 1	Ono	yes	yes
Kharkiv	7 Channel	News of 7 Kanal	yes	no
Donetsk	TV & RC Ukraina	Sobitiya	yes	yes
Lugansk	LCT (Lugansk Cable)	Vesti LCT	yes	yes
Odessa	Art	Novosti	yes	yes
Lviv	Mist	Reporter	yes	yes
Kirovograd	Ch 5 – Kirovograd Reg.	Deb za Dnem	yes	yes
Zhytomyr	Zhytomyr Reg. TV (Inter)	Novyny Zhytomyrshchyny	yes	yes

Where the data becomes more interesting is when we compare the respondent's second most popular choice of channel to the second most popular program. In half of the cases, the program does not match the preferred primary channel choice. In addition, half of the program choices do not hold the same position when compiled in the data of all program mentions. What this indicates is that specific local news programs have committed audiences who find them wherever they may be broadcast. They actively seek them out, whether or not they appear on their favorite local channels.

	2nd Local Channel Choice	2nd Local Program Choice Mention	Same Channel?	Program in same position for All Mentions?
Kyiv	UTAR	Za Kyivskim Chassom	no	no
Simferopol	Krym TV	12 Minute Novosti	yes	yes
Rivne	Rivne Reg. TV (Inter)	Den	yes	no
Dnipropetrovsk	Channel 9 (Novi Kanal)	News of Channel 9	yes	no
Mykolayiv	Mykolayiv Reg. TV (Inter)	TNN	yes	no
Kharkiv	Simon	ATN News	no	yes
Donetsk	Channel 27	Vesti	no	yes
Lugansk	IRTA (Novi Kanal)	Ekspress –Vesti (LCT)	no	no
Odessa	Videoservice (Ch 26)	Ko Vremini	no	yes
Lviv	Lviv Reg. TV	Visnik (Ch. 6)	yes	yes
Kirovograd	Channel 24 (TTV)	Ch 11- Kirovograd Reg. TV	no	no
Zhytomyr	Zhytomyr	Novyny Zhytomyrshchyny	yes	yes

Individual Local Channel Trust

In Question 12, respondents were also asked to rate their "trust" level for each Local Channel's news product as they did previously for all viewing options. Again, as this sample size is limited to only those who watch local news, statistical error is a greater probability. However, it is possible to make some assumptions based on the data.

Using only the first and second most popular choices for the respondent's first preference for Local Channel news, only two cities had the most popular choice correspond directly to a 5 rating of trust ("completely) to match on an equally dominant basis. These were Dnipropetrovsk "Channel 11" and Donetsk "TV & RC Ukraina."

As in the pattern described above for Level of Trust for National, Russian, and Local news, respondents usually supported their primary choice with a "4" rating – meaning fairly high, but not completely. In all but two cities, the "trust" level at 4 or 5 corresponded directly to the respondent's primary preference for Local News. The two exceptions were Zhytomyr and Lugansk where respondent's second choice of Local Channel actually enjoyed a higher level of trust than the viewer's first choice. These two markets consistently exhibit anomalies in the research.

Local News Topics of Interest

In Questions 13 and 14, respondents were provided with a list of ten topics and asked to check to off those that interested them and to also check off which of those topics that had the best coverage. In the best scenario, interest levels should correspond to the amount of coverage each topic receives. Ultimately, the category of "Other" was discarded from the data. In the Internews combined city report, "News of Legislation" was apparently combined with National News. In the individual city reports, nine topics received viewer responses. These were: Criminal, Show Business, Municipal or Communal Problems, Sports, Business, Local News, International News, National News, and Legislative News. Without exception, in every city the single most important topic of interest to local viewers was "Local News." The next most popular choices were National and International News. In a few cities Criminal or Municipal/Communal Problems replaced one of those two choices by a slight margin.

Some extremely important information for Local Channels was gathered in this part of the survey. That is: what is the viewer's judgement as to whether or not their topics of interest are adequately covered by local media? For example, in Lviv, while sports is considered a fairly important topic, local stations are clearly going overboard with their coverage. Sports is the only topic where the coverage rating actually exceeds the level of interest, and by a fairly large margin. In contrast, local news is viewed as substantially underserved. Lviv Local Channels should re-think their newsroom priorities to correct this perception. In Mykolayiv, too much coverage of both Sports and Criminal news exists in proportion to interest levels. Rivne was the only city where coverage exceeded interest for Local news (and Criminal news).

However, in nearly all other topic categories in all cities, the level of interest in any one topic exceeds the amount of coverage provided by Local Channels. Local audiences are expecting far more information than the Local Channels are currently providing. And, it's also clear that Local Channels do not understand the maxim "Know Your Audience." This is particularly true in the area of Local News. Improved professionalism and more resource commitments to newsgathering efforts are clearly indicated as a solution to this problem. Training and development opportunities exist for: better and faster newsgathering, newsroom organization & management, station resource management, and information sharing via improved IT (Information Technology- computerized newsrooms, internet, et al). In short, the audience interest for local news clearly already exists – a fact that many developed markets would envy. Any local station efforts to provide better news and information programming should reap immediate rewards in terms of audience delivery. Internews' on-site consultants can utilize this survey information in several ways: Management/Business consultants can assist Station Directors in re-organizing and maximizing resources to support better newsroom operations. Popular local news product translates directly into improved opportunities for advertising. News consultants can use the survey data to help News Directors improve editorial management of newsrooms, assign resources to match audience interests, and reinforce the importance of local newsgathering as a priority for program production. These efforts will ultimately increase audience, which in turn will support individual station growth.

Audience Topics of Interest for Local Channels

(figures rounded to one place)

City	Bus.	Sports	Leg. News	Nat. News	Int'l News	Local News	Muni.	Show Bus.	Crime
Kyiv	21.8%	35.7%	30.2%	58.7%	58.8%	76.3%	35.1%	19.0%	52.5%
Simferopol	13.1%	23.3%	35.8%	49.4%	63.2%	64.4%	37.1%	17.7%	50.5%
Rivne	11.9%	32.7%	18.3%	51.3%	50.0%	79.2%	34.8%	17.4%	52.3%
Dnipropetrovsk	16.4%	31.7%	27.6%	63.1%	75.8%	78.0%	44.6%	35.2%	57.2%
Mykolayiv	12.0%	22.7%	25.4%	49.6%	48.7%	68.1%	38.1%	13.0%	57.4%
Kharkiv	19.0%	31.9%	30.9%	51.6%	66.0%	82.2%	44.7%	22.0%	50.8%
Donetsk	14.5%	41.2%	31.4%	62.6%	73.9%	84.2%	35.5%	12.3%	63.9%
Lugansk	11.9%	24.1%	26.0%	44.5%	57.9%	73.9%	40.5%	8.4%	48.6%
Odessa	10.5%	24.2%	20.6%	45.6%	59.8%	70.2%	38.2%	12.0%	53.4%
Lviv	23.0%	37.4%	37.1%	49.1%	60.2%	68.7%	40.8%	21.4%	45.0%
Kirovograd	12.1%	21.1%	21.8%	33.3%	37.5%	83.7%	55.3%	10.9%	48.0%
Zhytomyr	20.6%	29.6%	17.4%	39.0%	39.8%	61.3%	27.4%	25.5%	32.9%
Estimated National Avg.	**15.6%**	**29.6%**	**26.9%**	**49.8%**	**57.6%**	**74.0%**	**39.3%**	**17.9%**	**51.0%**

Radio Usage

Question 15 asked the respondent if they had listened to the radio within the last 30 days. All cities reported that at least 82.9% of the population had indeed listened. Highest radio usage was reported in Kyiv (91.7%,) lowest in Simferopol (82.9%). Respondents were not asked to provide information about who owned the radio, or where they listened. Future radio surveys might include a choice of either "home," "auto," "public place" or "work" in order to refine listener demographics. For example, if the radio user listens while in a car, the listener might be more attentive to the message as they are essentially a captive audience with few distractions other than traffic. If listeners are in a public place, the radio is more likely simple background noise to whatever activity the listener is pursuing at the moment. Examples of such use are stores or café's. If they listen at work (which may be common in large industrial enterprises or factories) the station is most likely one that approved by the enterprise's management, so the listener may be constantly exposed to the message, but would not choose that station in another environment.

In home listeners can vary between captive audience and background listeners – often dependent on age demographics.

What Radio Stations are Most Popular

To answer Question 16, a list of all the radio stations available in the city was read out loud. Respondents were simply asked to identify those they had listened to in the last 30 days. There was no quantitative question asked to support the respondent's choices (daily, weekly, once a month, etc.). Therefore, we don't know if the listeners are normally steady listeners of one particular station but who may hear others from time to time, or if they randomly listen to any radio station that they or someone else have selected. What we can tell from this cumulative data are those stations that can be considered most popular judging from the number of respondents who say they have heard them. Further research into quantitative listener use of individual stations is desirable.

Radio can also be considered a more passive medium – meaning that it does not demand the individual's attention in the way that both television and print do. It is also considered a highly "personal" medium. Most radio listeners consider radio more like a friend that's talking to them alone and often consider a favorite radio station as "my" radio station. A misperception of course, but very useful as it tends to result in listener loyalty to a given station. Listeners like the format, know what to expect to hear, and usage becomes a habit. Such personal identification generally does not occur with either television or print. Research that clearly identifies listener demographics of a particular station translates into opportunities for targeting audience, which in turn delivers better results for advertising messages. And, increased advertising certainly corresponds to increased financial independence.

National Reach & Number One Radio Choices

True national reach (meaning the signal was available in each market) was achieved by only two radio sources: UR 1 and UR 2 (Promin). Near national reach (meaning a majority of the surveyed cities had the signal available) was achieved by five additional sources: Russkoye Radio, Hit FM, Europa Plus, Shanson, and Nashe Radio. At least one of these seven sources was included in the top three choices of every market.

Russkoye Radio was the number one choice for seven markets (Simferopol, Kharkiv, Dnipropetrovsk, Donetsk, Lugansk, Odessa, Mykolayiv. UR-1 was the number one choice in Kyiv.

In Lviv, Rivno, Kirovograd, and Zhytomyr, the number one choices are apparently locally originated radio stations, as these choices do not appear in any other cities. (Lviv= "Lux," Rivno = "Trek," Kirovograd = "Radio Novyi Den," Zhytomyr = "Zhytomyrska Hvyla"). Based on the popularity of these individual stations, further investigation for overall development assistance is highly recommended. It is unusual that these local stations have achieved such clear dominance in their respective markets.

Radio News Reports

From Question 5 ("primary source of information") we know that radio is not viewed as a critical source of information. However, since radio clearly enjoys high usage, the assumption is that radio is used primarily for entertainment purposes.

When respondents were asked to tell what they did when a radio news block came on, the large majority in every city reported that they continue to listen ("sometimes" and "almost always). Even though respondents did not rate radio as a primary method for securing information, they apparently will not make any effort to change the station when a news report comes on. For this reason, short news reports on radio could be viewed as a more effective means of information delivery rather than longer form radio content. Short news bulletins (and generally with fixed times of broadcast) should be viewed as the preferred system for information delivery as short reports lessen the motivation for the listener to change to another station. Again, this principle is common knowledge for music format broadcasters in the USA. Talk radio is another issue, but this format is usually rare in developing media markets.

VOA, BBC, Deutsche Welle and Regional News

Listnership for VOA is reported in all 12 markets, BBC in 11, and Deutsche Welle in 7. These three international sources did have listenership, but they were consistently ranked near the bottom of the popularity scale in every city. However, without additional analysis of the news sources for each station, it is not possible to accurately report the audience for these international news services. Many stations use clips from these sources to supplement their own newscast with international news, or to provide a different perspective from what is being reported by the national services. Research on the quantitative usage of these international sources by individual stations would be helpful in determining where additional alternative news services are needed.

Further, research on regional newsgathering applications as a whole for all media is not yet clearly identified. This area may also be quite underserved. For example, television stations in the Dnipropetrovsk Oblast have discovered that their audiences do appreciate regional news. The program "Tyzhden" ("Week") is a collection of news stories produced by seven regional television stations. The program is edited together by Channel 34, and then broadcast simultaneously on all seven stations on a fixed day and time period. According to the research for preferred local news programs in Dnipropetrovsk, "Tyzhden" is the sixth most popular choice of all local news programs, and the only other Channel 34 program (besides "Blitsfakt") that gets any mention at all in the survey. Anecdotal observation (Gaydosik – May 2001 regional consulting) at program partner city Dniprodzherzinsk concluded that this same program also enjoys widespread popularity in that city. Efforts to network stations to disseminate regional news (via text, audio, or video) should be encouraged and monitored for audience response - and actively supported in those areas where such programming is well received.

Conclusions

Statistically valid, third party audience research is fundamental to the operation and growth of any media outlet. It enables management to make informed decisions, improve programming, plan properly, and validate audience delivery to advertisers. Media in developing markets generally do not purchase or use audience research beyond an elementary level, usually defined as which station is "most popular." The research detailed in this report is merely a sample of the kind of information that can be gleaned using the MMI "Galileo" database system. Individual station training on use of such a database (with permission from MMI) is extremely important, if simply to illustrate what information is actually available to individual stations. By creating their own definitions of what fields to link, stations can uncover reams of information about their own local audiences. This information can be used to improve their news and entertainment product, create marketing and/or promotion materials, and help position stations with information to solicit advertising from both the international and local advertising market. As investigated and noted by Internews consultant Ron Klayman (May 2001 regional consulting), Kyiv based international advertising agencies are expressing interest in opening negotiations with regional television stations (and possibly radio). However, these agencies are demanding - at a minimum - that stations develop and provide materials that illustrate their market position. Reliable audience research is a key component of such material.

Stations must also clearly recognize the value of professional research and make commitments to support purchasing the information, rather than simply pirating it or substituting inadequate locally originated research (often produced by the station itself). MMI's current "Peoplemeter" national surveys are very comprehensive and far too expensive for individual stations to purchase. Their data is purchased almost exclusively by National Channels and international advertising agencies. However, MMI has also expressed some interest in developing a scaled down version for sale to individual stations in those markets where they are already doing "Peoplemeter" surveys. This possibility should be explored, and perhaps pursued in conjunction with the trade organization of the Independent Association of Broadcasters. In this author's personal experience in developing markets (Russia and Bosnia-Herzegovina), reliable audience research has been a proven means to implementing dramatic changes in the fortunes of non-governmental media.